

## SOAR Meeting Summary

Houston, TX

Feb 16-17, 2005

### Attendance List

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### Opening Remarks

Tony Wylie started the meeting by welcoming attendees, and introductions were made around the table. He then introduced Steve Creamer and Mark Pallone to the group. Steve said that oceanic and international issues are very important for the agency to focus on, and wanted to give the SOAR group his thoughts on possible other activities for the group to pursue. Mark Pallone said he was looking forward to leaning more about SOAR.

### ATO Briefing

Briefing #1 Steve Creamer gave a briefing on the ATO FY05 business outlook.

The ATO has to respond to a changing environment, and planning will be the key. The ATO cannot do “business as usual”, and must manage its work better. More emphasis will be placed on milestones and deliverables.

Issues:

- Demand is growing, but business-as-usual costs are rising.
- Industry restructuring (lower ticket prices, smaller aircraft) is causing unit revenue to fall.
- The cost/revenue gap is widening.
- Stakeholder input is needed.

Steve then reviewed the organizational structure of the ATO, and emphasized the importance of Finance:

- 1) Organize around our customers. Define the products and services from an external perspective to set our “service model.”
- 2) Change the leadership model.
- 3) Simplify the basis of performance. Develop metrics based on value-based units of output.
- 4) Baseline our resources, and understand the basic resources and cost drivers.
- 5) Develop a rolling 5-yr plan (forward planning).
- 6) Execute the plan.

Going forward, ‘milestones met’ will be key to future funding:

- 1) Improve Safety. Always the #1 priority.
  - 2) Greater capacity.
  - 3) International Leadership, foster international collaboration.
  - 4) Organizational Excellence.
- #s 2,3, & 4 are key.

The ATO conducted an international review of air traffic service providers that have developed different business plans and structures. Each organization had some good results and some problems; the major lesson learned from them is that change does not happen overnight, and there is no ‘silver bullet’ for the process.

To appreciate the scale of the ATO, it is 6x larger than the 2<sup>nd</sup> largest AT provider. The budget is \$9.1 billion, with \$6.2b for operations and \$2.9b for capital expenditures. Replacement value is \$30-35b, there are 34,000 employees, and 40,000+ NAS components.

There is a 3-sided ‘service model’, and there must be conversations among these 3 groups in order to develop long-term solutions:

- Employees - define the internal priorities.
- Customers - define the needs.
- Owners – define what’s important.

Operations budget annual growth rates over the last 10 years:

Non-salary expenses	7.7% increase
Benefits	7.9% increase
Compensation	5.4% increase

Unit cost has risen 30% since 1998; during that time flights per controller have risen 15%.

Staffing has been reduced from 38,600 to 34,000 through attrition. Replacement projections show a further decline from attrition, although a hiring schedule has been established to compensate for the controller retirement 'bubble'. ATO spending is split 77% for compensation (61%) and benefits (16%), with 23% for non-salary expenses. The compensation breakdown is: 31% tech ops, 30% terminal, 25% en route, 6% flight services, and 8% other staff.

Last year the Aviation Trust Fund provided 78% of the funding, with the General Fund providing the other 22%; this gap is projected to grow.

FY2000 is the base year for traffic count; FY05 is just reaching the FY00 count. By FY09 it is estimated there will be a 9% growth in volume. It is also projected that oceanic traffic will increase 30-38% over the next 5 years.

Ticket prices are going down, and the use of smaller jets mean higher load factors but lower capacity per plane. Tax revenue per flight over the last 4 years has gone down 31%.

The ATO is faced with anticipated increases in workload and complexity, combined with a reduced budget.

Another factor to deal with is the aging buildings/facilities. Average ages:

- Towers - 30 yrs.
- TRACON – 34 yrs.
- ARTCC – 40 yrs. (ZAN is the newest.)
- FSS – 20 yrs.

The average ARTCC facility condition index is “poor”, and getting worse. The ATO must understand and be able to speak to the spending elements. Only about 20% of the capital budget goes to new elements of the system, 80% is used to replace old elements.

The ATO's new financial approach:

- 1) Plan for the future.
- 2) Account for every dollar.
- 3) Deliver the services our customers need.
- 4) Focus limited resources.
- 5) Measure successes and results.

Also, the ATO must engage our owners, customers, and employees in bold and innovative, long-term solutions.

Briefing #2 Steve then gave a briefing on the Strategic Management Process, System Operations.

This briefing covered the key steps in the integrated planning/budgeting process for FY07.

There is currently a 4-month window in time to estimate the FY07 budget. No programs will be added after that for FY07.

The Strategic Map has 4 major 'pathways':

- 1) Achieve Operational Excellence
- 2) Enhance Financial Discipline
- 3) Increase Capacity Where Needed
- 4) Ensure Viable Future

NAR and SOAR link into Pathway 3 (PW3). Additionally, two of the elements on PW3 have been highlighted:

- The Executive Council nominated "Airspace Redesign" as a "Top-10" item.
- "Implement Airspace & Airport Capacity Enhancement" was voted as "critical" by Russ Chew.

It is vital that SOAR identifies measurements/metrics that can be tracked and linked to critical major initiatives.

Steve then reviewed the Strategy Map and Initiative template formats. The Strategy Map has the 4 Pathways identified above, with each pathway made of sections for owner elements, customer elements, internal process elements, and employee elements. All elements link to the business plan and Flight Plan.

The Initiative template includes:

- Initiative summary
- Activities or segments
- Deliverables and Milestones
- Relevance
- Productivity increase or cost reduction
- Benefits/cost
- Risks

The Relevance ratings are:

- 5 = Clearly drives improvement to a critical objective
- 4 = Probably drives improvement to a critical objective
- 3 = Clearly drives improvement to a non-critical objective
- 2 = Probably drives improvement to a non-critical objective
- 1 = Not linked to a strategy map object

The Increase Productivity/Reduce Cost ratings are:

- 5 = Reduce cost or increase productivity significantly for a critical objective

- 4 = Reduce cost or increase productivity moderately for critical objective
- 3 = Reduce cost or increase productivity significantly for non-critical objective
- 2 = Reduce cost or increase productivity moderately for non-critical objective
- 1 = No clear impact demonstrated

Steve explained the need to identify the oceanic customer representation groups (GOMEX, etc.). It is hoped that SOAR will become the vehicle/resource for moving international/oceanic initiatives. FY07 is what we need to work on to ensure ongoing funding. It is now at the point of a short window to set the FY07 budget.

Further discussion will be held in the near future to elaborate on what SOAR's expanded role should include.

### **International Briefing**

Leslie Cary gave a briefing on the status of the IATA route requests, and began with a recap of the issue for the new folks at the meeting. In July, 2004, a meeting was held with IATA, where IATA presented issues regarding the 'inflexibility' of the outstanding requests. The FAA explained why the requests as proposed had not been adopted, and a group was mandated to look at the issue to find some compromise and/or recommend improvements. The analysis report is due at the end of February.

A discussion then was held regarding the work/user groups that should be involved, or reactivated, to give input to these types of issues. The more interactive we are with the users, the more satisfactory the end product will be, and the better perception the users will have of it.

Tony asked on the specific issue at hand, three facilities were to get together to review and make suggestions/recommendations. Is there feedback from that review? Yes, there was input. ZNY made some changes. ZHU and ZMA looked at the issue, but have constraints that prohibit an effective modification. Time-of-day parameters didn't work because of traffic during the times the new user wanted the routes. Also, at ZHU, for example, they could get one flight in earlier but there wouldn't be a gate available to park at.

Leslie said that long-term procedural modifications to capabilities would be needed to be able to make these kind of changes, such as reduced separation standards, improved automation and equipment, etc. International responses also affect what can be done, i.e., 30-30 won't/can't be tested domestically because it won't be agreed to internationally.

In summary - no action on this issue at this time, but for the long-term, we should set up interaction between this group and the customers. A lack of a customer forum for GOM or WATRS gives the bad impression that there's no response to customer issues. OWG is successful on the west coast.

Steve said that the group must identify what is the cause of limits, decide what alternatives are available, and which issues have high enough priority to justify the needed resources. Tony said the emphasis over the next couple of years will be on good planning, to define the large \$-savings improvements. Steve said to first look at unresolved airspace action issues from user forums/groups, and see if they can be incorporated into SOAR issues, then define initiatives (per the Initiative Template) to set out the benefits and risks of the issues.

As we work with user groups, the right people must be sent so they can speak for their part of the organization, facility, etc. This will make the meetings more profitable. NATCA involvement will be critical for a) easier end-product buy-in, and b) technical expertise. They are a part of the FAA team; this must be an integrated effort.

Action item – a group will be assigned to work on identifying unresolved airspace action issues from user groups.

## **Lunch Break**

Bruce Thorson joined the group.

## **SOAR Pacific Project Update**

Dave Maynard briefed on ATOP status. IOC was June 29, 2004, 1 sector only on a limited basis. For clarification, Dave explained that ATOP (Advanced Technologies and Oceanic Procedures) is the name of the program, and OCEAN21 is the ICAO compliant flight data processing (FDP) system for ATOP.

Ocean21 can do 50/50, but the airspace is not ready for 30/30 yet; the software change is being readied. Procedures are ready, but the safety case has not yet been completed. Countries in the South Pacific have implemented 30/30. Tokyo won't be ready until 2006 or later.

Current program dates for Build2 (procedural) IOC:

ZNY – March, 2005

ZOA – June 27, 2005, pending software work (PTRs)

ZAN – February, 2006

Dave then provided an overview of Ocean21 functionality. A discussion followed regarding the program dates. ZNY wants to have Ocean21 up and running for 30 days prior to converting. They still have a few PTRs pending on critical issues, then the stabilizing period can start. ZOA's dates may move if resources are required at ZNY.

Dave reviewed the status of SOAR Pacific projects and initiatives, and talked about restarting a couple of the sub-projects. A discussion followed on how to plan to get the funding stream restarted so work can start.

Ron Sparks said that there are two ZAN projects also on hold pending ATOP.

In response to a question it was pointed out that ATOP does not have the capability to generate routes/tracks.

### **Administrative Briefing**

Pat Bergt reviewed several administrative items, starting with her contact information and asking for AO contact information at the facilities and Service Area offices.

Copies of SOAR-related travel authorizations and travel vouchers (all pages, no receipts) must be sent to Pat as soon as they are available. Remember that all privacy information (SSN, home address, etc.) must be blacked out/'sanitized' prior to sending the documents.

There has been a change to the budget process for NAR. Previously, all expenses for a project were booked to a single cost center (lead facility or service area office), but starting in the near future each expense will be booked to the cost center where it was generated regardless of which project it was for. SOAR (and HAR) will not be making this change. All SOAR expenses will continue to be booked to Alaska. Please keep this difference in mind when having authorizations and vouchers prepared because there may be some confusion about it.

It is important to ensure that the facility AOs know how to properly handle SOAR-related overtime. If it's not processed correctly and in a timely manner, the overtime will remain part of the facility's operational overtime. AOs should be referred to Pat if they have any questions.

The minutes from the present meeting will be sent out electronically in a few weeks. The entire package that includes the presentations will be made available on CD. Those who want a copy need to give Pat their mailing address.

### **SOAR Gulf of Mexico Project Update**

Traffic increased in the Gulf of Mexico 14% in FY04. From March 1994 to March 2004, traffic increased 70%. The southeast corner of the Gulf increased 30% in 1 year. Peak days: Mar, 04 = 451 operations (spring break), Oct, 04 = 284 operations; this variation was handled with the same staff and equipment.

A discussion then followed regarding traffic volume issues.

Current projects/issues:

- DRVSM in the Gulf of Mexico
- Gulf Route Expansion
- Tex-Mex-Cal Routes
- ZHU-ZMA FIR Boundary Realignment
- ZHU-Mex Flight Data Transfer
- SafeFlight21/ADS-B

DRVSM was implemented 1/20/05 in domestic airspace and US controlled portion of the Gulf. Usage will continue to be limited due to non-radar constraints.

Gulf Route Expansion involves ingress/egress to the Gulf, and requires CNS improvements to implement. No action currently planned.

TexMexCal Routes – ZLA wants the automatic interface up and running prior to doing these routes (should be later this year). Mexico is now willing to go forward with it, but probably only 1 route, not 2. HAR is currently working this issue, but it is not their highest priority.

ZHU GOM Future Goals:

- Communications throughout the Gulf at or above FL240
- Surveillance through ADS-B throughout the Gulf

Flight tests conducted by SafeFlight21 tested ADS-B and multi-lat in the Gulf Nov, 2003, through May, 2004, using FAA and NASA aircraft. This technology could provide surveillance in the majority of US-controlled airspace in the Gulf at and above FL280.

The testing left 3 sensors in place. The choice now is to remove and warehouse the sensors, or keep them in place and gather more data from them. The intent so far is to shelve them. NASA has published their evaluation report; Bruce Thorson can get copies for anyone who's interested.

Bruce would like to see the Gulf SafeFlight21 initiatives continue through SOAR. Part of the problem is the helicopter component – that community also wants weather coverage. En route could be separated from helicopters, but that's not the best answer.

Right now, SOAR is the only vehicle for Gulf issues. This ties in with Steve's talk this morning re: an expanded scope of SOAR's function, i.e. assuming a leadership role in user forums.

ZHU-Mex flight data transfer was operational northbound on 1/26/04; the southbound test was 8/23/04, with operational turn on 11/30/04. Leslie Cary said that the southbound process has had problems, including a periodic shutoff. They will try to push out the advance time from 15 minutes to 25 minutes, but this may cause routing issues due to



changes made in the last 25 minutes. There will be a 24-hr test, followed by a reevaluation of the situation.

The FIR Boundary project is on hold, waiting for the authorizing letter for the sort box change. A discussion followed regarding the delay issue.

There is a potential new project for the Gulf of Mexico:

- Traffic southwest-bound on A649 has a conflict with non-radar northwest-bound on A766.
- Moving the southwest-bound traffic to A552 shifts the conflict to radar coverage.
- Mexico uses A552 as one-way for northeast-bound traffic.
- Negotiations opened during SENEAM to US visit and RVSM meeting in Mexico.

### **SOAR Atlantic Project Update**

The North Atlantic reconfiguration is complete.

The Area F reconfiguration is introducing the concept of single-person sectors as opposed to multi-person sectors.

The Traffic Density Analyzer (Forecasting, Flow Mgmt website) now has 185 airline operators, ATC agencies and Flow Management units subscribed to the site. The site is sponsored and funded by NavCanada.

The Philadelphia Route Reduction project is complete, with \$0 cost. This was an education process with the users to make them aware that the option exists for filing from the ground.

The Boston-Caribbean Route Reduction is complete, with \$0 cost.

The Delta Airlines Route Modification is complete, with \$0 cost.

ZNY/ZDC Airspace Exchange is progressing, \$0 spent to date.

ATOP – the IOC is scheduled for 3/05. 45 controllers are currently trained with 15 more in class. They are currently developing training procedures. Set a record oceanic count in early January, but currently ODAPS cannot handle record traffic count days due to systems limitations.

A brief discussion followed with the attendees from ZMA regarding the status of their “offshore/oceanic” area.

## **End of Day**

Tony covered some housekeeping issues, then adjourned the meeting for the day.

## **SECOND DAY – FEBRUARY 17**

Tony began the meeting with a brief review of day 1 and the agenda for day 2.

### **MITRE Briefing**

Lee Brown from MITRE gave a briefing on “Post-Implementation Evaluation for NAT”. This topic came up from issues involved with calculating benefits after the fact for the Pacific Gateway project. This has been difficult, and now need to brief the NAT/SOAR FLT's on the importance of the process and the technique involved. Guidelines are available on the NAR website.

The process needs to be included in the project from the start; the baseline data must first be identified/established in order to show improvements realized from the project. There is no existing database of oceanic metrics and/or raw data. The airlines don't keep their data very long, either, so they are not a resource after the fact. Other sources must be drawn on; ATOP, for example, will help.

Even though the evaluation is done last in a project, measurements and planning for evaluation must start first.

- 1) Characterize the problem, identify metrics, and measure the system.
- 2) Collect performance data necessary for the post-implementation evaluation, and identify relevant NAS changes.
- 3) Develop the evaluation plan.
- 4) Measure the system.

There was discussion re: measurements, who has the expertise to decide what to measure and how to measure it, what should be included in project proposals to justify funding? There must be a definition of what are airline/customer problems versus FAA problems. FLT's need to do a much better job in Phase 1 of a project (Planning) in order to be able to produce a quality produce in Phase 4 (Implementation).

In Phase 2 (Airspace Study), be sure to clearly identify relevant NAS changes, so changes in system performance can be correctly identified. Multiple changes in programs happening at the same time can muddy the measurement waters when each program claims credit for the improvements.

Measurements should continue for up to one year at 3 months, 6 months, and 1 year intervals, because it takes time for the full impact to be felt. If you have to keep records longer than the rules allow, notify Eval what's being saved and why. Should eliminate the retention problem. Keep records on "measurable delays: in addition to "reportable delays, for example. There was discussion regarding metrics, airlines reluctant to complain, other players, etc.

Restrictions can be easy to measure but hard to model or simulate. Choose measurement criteria carefully, and state them clearly. Ideal metrics should:

- Quantify existing problem.
- Be useful to measure improvements.
- Be measurable with existing data.
- Influence level of modeling fidelity.

Decide what is to be measured and who is responsible early in the process.

There was a discussion regarding how to come up with metrics for the ocean. None currently exist, and may be a SOAR issue to develop them. Use the Airspace Handbook as reference; it provides data sources and tools for reference.

Tony said that in the past we've done press releases for successful completion of our projects, and the releases included savings information and the goals achieved right away, before follow-up data can be collected. How should we handle this situation? Lee said the FLTs can issue releases right away, and say "anticipated savings." Later they can issue another release that states "this is what we actually achieved," and include airline quotes confirming the savings as a plus.

There is interest in finding modeling software for the ocean; no firm results from the search yet.

Lee showed an example of a report, using the PHL Reduced Routing project. There was discussion about routing modifications that are made but don't get to the dispatchers and pilots at the airlines. This might be a good reason to restart the customer forum for discussion and information exchange.

## **ALT Budget Review**

Tony reviewed the budget from the ALT and showed the project funding priority list (a couple of months old). The priorities were established by:

- 1) Mandates,
- 2) Tied to initiatives (Flight Plan),
- 3) Tied to an OEP runway,
- 4) In OEP but not runway,
- 5) All other.

Also, all 6 Service Area Directors and the procedures directors from Headquarters decided their priorities. All this was brought to the Portland ALT. An emphasis was put on those things that could get done this year. Also, some were partially funded just to keep the project alive. Previously, when reducing the budget, all projects would be reduced the same percentage. This year, each project was evaluated; some won't be funded, some were reduced, etc.

Tony reviewed the change in budget since the ALT, and explained the give-back of unused money. It is even more important now to get expense information to Pat as quickly as possible so obligated money is documented and held. For spend plans next year, we will need closer estimates of needs, plus closer target dates for meetings, activities, etc.

### **SOAR Charter Amendments**

Tony reviewed the recent SOAR Charter amendments for the benefit of the new members and attendees. He explained the new membership definitions and criteria; there are 2 Core Group meetings and 2 General Group meetings. As a facility has an active project that requires monthly reports, they attend all meetings.

The group should remain at the smallest practical size so the members can effectively work the issues; an unnecessarily large group can prevent it from being effective/efficient.

Tony pointed out that NATCA membership is aligned with the previous Regions, and the management membership is aligned with the new Service Areas. In response to a suggestion, he will make a change to the Charter wording to include the "management" specification. Mark Pallone's title in the Charter may need to be changed. The Charter will be sent to Steve Creamer and Mark Pallone for review and approval.

### **Lunch Break**

### **SOAR Website**

Tony asked what members would like to see on a website? Should we just develop one and bring it back for review? It would be an oceanic website linked to the NAR website. Suggestions:

- Feedback line, no chatline, to a mailbox.
- Links to NAR, HAR, ATO.
- Metrics?

Design ideas will be brought back to the group.

## **Other Topics**

The group held a discussion to follow up on Steve Creamer's comments regarding SOAR helping to move international/oceanic initiatives. Tony said that SOAR was envisioned as a sub-group to the ALT, as an airspace redesign function. Now there is interest in using the expertise to extend into other issues, such as procedural, international, etc. In that role there would be some level of interface with customers. Some redefinition is coming. Ron Sparks said that there had always been the intent for SOAR representation in Work Group meetings.

A discussion followed. Leslie Cary said there are international groups for the Caribbean, but nothing FAA-driven for other oceanic areas. There is no forum for the Caribbean and Latin American requests made during the last 2 years. There is no dialog.

Caribbean issues used to be part of the NY Capacity Task Force. The Gulf of Mexico Work Group (GOMWG) has not met in a substantial way for some time. The Oceanic Work Group (OWG) for the Pacific is the only active work group left. There is no funding for work group activities on the FAA side. The forums need to be restarted so discussions can happen. The Atlantic Work Group may focus too much on domestic, with non-oceanic expertise in attendance.

Steve Algona said that NAR is mandated to deal with RTCA. Should we start by getting their input on oceanic work groups and issues? Bob Berry asked if meetings should be held near the major hubs, which should ensure some major air carrier participation, at least from the nearby hub? The meetings could rotate around the hubs. Mike Silvestre commented that airlines and the military have had cost/expense constraints for travel, making it hard to get them to meetings. The question was asked if the airlines would send their oceanic 'gurus'? if not, the airlines won't get much from the meetings.

Tony said SOAR's mission will not be in the position of chairing the meetings, it will be to support the folks who need assistance/support, and maybe to attend and participate. The question was asked if the TMU should be the filter/contact? Probably not, they are the day-to-day, domestic interface with the users. Their oceanic expertise is limited.

The SOAR group can provide cross-pollination of ideas, etc. there was a discussion regarding what the meetings should be, who should be invited (in general), and SOAR's role. Tony said that we may need to develop a strategic plan for how to deal with the different parts of the country. What resources are needed to enable this user input/relationship? Pete Gullo observed that oceanic changes affect domestic issues, so coordination and collaboration is needed with other sub-groups, NAR, etc. Perhaps a clearinghouse function?

Tony has a follow-up meeting with Steve Creamer to clarify what he has in mind for this group.

## **Next Meeting**

The group needs to move forward on metrics. The next meeting should be devoted to that topic. The next meeting on the schedule would be the core group, but we should consider whether more people are needed.

The next meeting will be in New York, tentatively scheduled for the week of May 23. A final date will be set soon. A suggestion was made to consider adding a day for customer feedback, briefings, etc? Could be added to the first day so information could be discussed on the following days. Another suggestion was to schedule SOAR meetings with existing customer meetings to partner the two? These ideas should wait pending Tony's follow-up conversation with Steve.

There was no other business, so the meeting was adjourned.

## **Follow-Up**

On March 10, 2005, a conference call was held to discuss scheduling for the next quarterly meeting. The following are the minutes from that telecon.

### **SOAR TELECON 3/10/05**

Attendees: Bob Berry, Steve Creamer, Leslie Cary, Pete Hruz, Tony Wylie, Pat Bergt, Mike Silvestre

The call was to discuss the next quarterly meeting, tentatively scheduled for New York in May. Scheduling conflicts have developed, necessitating a new discussion.

It was decided to cancel the 3<sup>rd</sup> quarter meeting, and schedule the 4<sup>th</sup> quarter meeting for New York. Summer leave schedules are set, so the week of September 12<sup>th</sup> was decided on. Pete Hruz will look into arrangements at a Hilton Garden Inn that is nearby, and there is room at ZNY for the meeting.

In the interim, telecons will be held to work on the issue of developing metrics for SOAR. Steve Creamer needs these as soon as possible to use in the FY07 budget/funding discussions that will be completed by May.

Also, Tony and Ron will be going to D.C. to meet with Steve in the near future regarding possible additional tasking for SOAR. Steve will bring Leslie Cary, Ann Moore, and

others to the discussion. Dave Maynard has expressed interest in going, and the other core team FLT's are welcome; they should let Tony know if they are interested in attending.

As a final note, the next ALT meeting will still be held during the scheduled week, but the location will change. The new location has not yet been finalized. (It was later decided to hold the meeting in New Orleans.)